

**PROGRAM OF WORK AND BUDGET  
CONDOMINIUM REVIEW COMMITTEE  
Chair: William Chee  
Vice-Chair: Mark Suiso**

**FISCAL YEAR 2007**

**CONDOMINIUM RECODIFICATION AND EDUCATION**

- carryover program
- Act 164 (2004 SLH), Act 93 (2005 SLH), Act 273 (2006 SLH)
- provide briefings, updates, and presentations to the condominium community, Administration, including the REB website, Condominium Bulletin, Real Estate Bulletin, etc.
- develop and produce a statewide multifaceted low cost educational plan for recodification, utilizing volunteer presenters and contracted consultant for different audiences and through different mediums, conduct educational sessions in each county and through partnerships with various organizations/government agencies
- review and amend all affected forms, instructions, informational sheets as appropriate
- review and amend existing REC-developed educational materials
- joint program with LRRC and ERC as to those recodification issues that are pertinent to real estate licensees

**ADVICE, EDUCATION, AND REFERRAL**

- continuous program
- provide advice, education, and referrals to the condominium community, applicants, consumers, licensees, government officials, organizations, public, etc.; including research, reproduction, mailing, etc.
- amend, print and distribute copy of §514A and §514B, HRS, and Rules to each registered association and registered condominium managing agent
- administer and provide requestors access to review public information and records, including requests for copies; subject to compliance with the Uniform

Information Practice Act and working with the Office of Information Practices

- collect and provide statistical reports on telephonic, walk-in, and correspondence on the above
- study and report on the feasibility of providing information and advice on telephonically prerecorded messages and providing to e-mail systems, including e-government, webpage, etc.
- maintain and improve webpage through the internet; consider controlled use of e-mail, including the education calendar and condominium database; add section to the webpage on the most commonly asked questions
- augment delivery of advice, education, and referral, including print, media and community-based interactive efforts, focusing on current condominium issues
- study the feasibility of a monthly on-line chat discussion with a condominium specialist on pre-selected topics; promoting self governance by providing a forum for associations to network and problem solve together
- study the feasibility of a grant program to board of directors to participate in Commission-approved education programs, the grant is to subsidize any fee associated with the education program
- upon request and subject to ground rules and the SEO's decision, Condominium Specialist may attend a registered AOA or Board of Director's meeting

**CONDOMINIUM PROJECT AND DEVELOPER'S PUBLIC REPORTS**

- continuous program
- administer the registration of condominium projects and the issuance of effective dates for developer's public reports
- continuous evaluation of the process, records, forms, information documents, rules, coordination with other governmental agencies, coordination with attorneys, etc., to ensure more timely processing and review time, update and amend all project forms and instructions
- administration of condominium consultants, examine contracts and Procurement Law with the initiation of any requirements, administer the evaluation system on consultants, which includes monitoring and providing

reports to the REC on each condominium consultant's assignments, performance, and feedback from Staff and developers, discuss evaluations with each consultant

- review and update checklists, send information and decisions to developers and attorneys on website
- administer and continue to provide public access to review the developer's public reports and other project documents, including requests for copies; subject to compliance with the Uniform Information Practice Act and working with the Office of Information Practices; continue to administer Condo Log in Pacific Business News; implement plan of providing access to developer's public reports through compact discs, State Library locations, REC webpage, etc.
- continue the compiling and indexing of all information/decisions to developers, condominium consultants, and others; including periodic distribution
- plan, develop, and administer any legislative amendments into the registration program; especially collaboration with the Time Share Administrator on any Acts that impacts both Time Share and Condominiums
- implement plan of listing of projects with current developer's public reports on REC webpage
- provide quarterly statistics on CPR registration, developer's public reports, and the processing
- implement a plan of electronic administration, including the scanning of documents on CDs and computerized project tracking, consider contracted vendors, consider the development of unalterable fillable developer's public report forms
- study, report, and recommend a comprehensive evaluation system on the registration and review process, including the use of evaluation forms by developers and attorneys

#### **HAWAII CONDOMINIUM BULLETIN**

- continuous program
- developing, writing, editing, low cost printing and distribution of a quarterly bulletin to all registered condominium associations (board of directors) and CMAs; target board of directors and apartment owners in the management of AOAOS; consider utilizing materials previously developed by the REC or others with permission; master education/meeting calendar,

pertinent case law review, etc.; plan, develop and provide for guest articles on relevant topics; lead staff member to work with Commissioners to provide an advance plan, deadline dates, and topic outline at least 45 days in advance of distribution deadlines; DISTRIBUTION DEADLINES: 15<sup>TH</sup> of August, November, February and May

- provide copies to registered AOAOs and CMAs as follows:

AOAO:	6 - 7 apts	1 bulletin
	8 - 200 apts	7 bulletins
	201 and over apts	11 bulletins
CMA:	7 bulletins	
- provide for one bulletin distribution to include a copy of the amended Chapter 514A, HRS, Chapter 514B, HRS, and one bulletin distribution to include a copy of the amended Chapter 107, HAR, when approved; purchased or reimburse costs to ASO
- upon completion and before printing/distribution, contents of bulletin shall be immediately submitted to the REC website
- administer the contract with the consultant and all services under the procurement law
- develop a plan for in-house electronic publication, including user-friendly software determination and training
- develop and include a periodic electronic survey-evaluation of bulletin, including surveys from various other programs
- develop and update articles on AOAOs utilizing technology for self-governance, information, discussion, exchanging, documents, etc.
- study feasibility of either increasing the bulletin up to 12 pages with the addition of a developer's section, or a developer's bulletin, or a special webpage for developers
- study the feasibility of electronic delivery of the bulletin to registered AOAOs and/or delivery solely by REC website with an increased number of bulletins
- consider "developers reference file" and consultants contributing articles

#### CONDOMINIUM MEDIATION AND ARBITRATION PROGRAM

- continuous program

- condominium governance mediation, continue program and administer contracts with condominium mediation subsidy program and training
- initiate and work with the Mediation Center of the Pacific to provide educational seminars to the board of directors, apartment owners, CMAs on the purpose of alternative dispute resolution and mediation, as well as providing training to consultants
- administer consultant contracts; continue to review the demand for additional consultants
- collect data, monitor and consult with arbitration groups, including the American Arbitration Association and Dispute Prevention and Resolution
- development and collection of information and statistical data for education and annual report purposes, especially mediation under Act 232 (SLH 2001); in addition, provide periodic reports to CRC on material information on each case submitted for subsidy programs which is to be utilized in education programs, including Condo Bulletin and REC Webpage
- proactively promote REC-funded mediation programs, including the distribution of the condo mediation brochure
- coordinate joint complaint/mediation program with RICO with funding from CEF, see Division and Department Program
- study the feasibility of the CEF funding the filing of an arbitration

#### **CDR PILOT PROGRAM**

- pilot program to end June 30, 2009
- subject to the lead by the Administrative Hearings Office, assist in the administration of the pilot program
- continue to assist the administrative Hearings Office in any educational and awareness program

#### **CONDOMINIUM ASSOCIATION REGISTRATION**

- continuous program
- review and monitor program for improvement of problem areas; records administration; administer biennial

registration including fidelity bond requirement;  
provide statistics periodically

- develop a paperless fidelity bond review process
- outreach program with CMAs and AOAOS for "Steps to a Better Re-registration;" workshops, including neighbor island sites; administer re-registration filing deadline and providing numerous advance communications on the deadline
- study, report, and initiate an electronic application processing recommendations, or computer generated forms with previous responses for recertification or amendments feasibility of internet re-registration process
- plan, develop, and administer any legislative amendments into registration program
- administer a public list of all registered AOAOS, including pertinent information for distribution upon request subject to copying fees, and via scanning including actual registration forms in REC webpage
- compile a biennial profile of registered AOAOS based on the data fields gathered from the registration information

#### **CONDOMINIUM SEMINARS AND SYMPOSIUM**

- continuous program
- produce seminars for the condominium community through contracts with various providers that provide for registration fee subsidies for apartment owners of registered AOAOS; continue to encourage new providers
- administer a CRC educational advisory group to provide recommendations and input about CRC educational programs; group to include board members, resident managers, representatives from self managed AOAOS, CMAs, condominium organizations, and educators
- subject to resources and utilizing existing REC educational materials, produce cost effective seminars utilizing public facilities, staff, Commissioners and volunteer speakers; no cost to apartment owners of registered AOAOS
- cancellation policy based on minimum early registration requirement, complimentary admission for Commissioners, staff members, RICO staff members

- produce a seminar on reserves, especially the cash flow funding method, collaborate with CAI-Hawaii and any other interested parties
- proactively seek additional consultants, especially on the neighbor islands, consider AARP, local Boards of Realtors, Mililani Community Association, etc.
- joint program with "Recodification of Chapter 514A"
- research web re-broadcast of all CEF seminars

#### **EDUCATION ADVISORY GROUP**

- carryover program
- administer the CRC Educational Advisory Group consisting of members of the condominium community who meet periodically; subcommittee to provide recommendations on condominium education
- develop a timetable for electronic consumer brochure for condo living
- consider the development of an electronic consumer brochure for seniors
- consider the development of an electronic brochure for real estate brokers to distribute to new owners and tenants of residential condominium units

#### **CONDOMINIUM MANAGING AGENTS REGISTRATION**

- continuous program
- with Licensing Branch, administer program, registration procedures, forms, instructions, deadlines, deficiencies, enforcement, fidelity bond, etc. for improvement and problem resolutions
- develop a paperless fidelity bond review process
- administer re-registration program, participate in Batch Renewal Program; work with Licensing Branch for internet re-registration
- listing of all registered CMAs in REC webpage, including information on PB, fidelity bond, and preprinted lists to be available upon request

#### **CONDOMINIUM HOTEL OPERATOR REGISTRATION**

- continuous program

- administer registration program; administer the biennial CHO re-registration program, participate in Batch Renewal Program
- review and recommend amendments to the administration of CHO registration, including forms, information, records management, fidelity bond, review process, etc.
- provide listing of all registered and include in REC webpage
- determine sources to locate unregistered CHOs, including county records, HVB, advertising, etc.; initiate initial compliance through education
- develop and distribute startup kits for CHOs, similar to CMAs

#### **RULE-MAKING, CHAPTER 107**

- carryover program
- study and evaluate Chapter 107, HAR, and Chapter 514A, HRS, for rule making; research, draft, review/comment by focus groups and other interested parties, informal consultation with Deputy Attorney General, include among others, REC decisions/informal opinions, formal opinions/declaratory rulings, deregulation without reducing consumer protection and reducing use of resources, etc.
- administer formal rulemaking process; submit to formal process, notice and formal hearing; upon request, provide a copy of proposed rules; consider including proposed rules and/or hearing notice in REC webpage
- provide informal briefings by staff and/or Commissioner
- consider recommendations received from the various participants in recodification, CRC, community workshops, government officials, organizations as to rulemaking for the new law; joint program with "Recodification of Chapter 514A"

#### **MEETINGS**

- continuous program
- plan, coordinate, and conduct monthly Condominium Review Committee meetings; including arrangement for facilities, agenda, testifiers, minutes, briefings to Chair and SEO, and pre- and post-meeting requirements; provide schedule of meetings and agendas to participants and include in REC webpage



- develop meetings minutes on PDF and searchable

#### **GOVERNMENT AND LEGISLATIVE PARTICIPATION AND REPORT**

- continuous program
- jointly with ERC and the Real Estate Bulletin, research, develop, print, and distribute annual report to the Legislature on condominium education fund, program of work, budget, and mediation program; immediately upon completion to be submitted to REC  
webpage DEADLINE TO COMPLETE CONDO REPORT: November 15
- coordinate with Administration, provide briefings to Legislators and staff, act as resource, researching and drafting legislative bills/committee reports, submit testimony, present oral testimony, bill tracking
- respond to elected officials inquiries/complaints/requests for information/etc., including Governor, Lt. Governor, Director, Deputy Director, PVL Administrator, Congressional members, Legislators, Mayors, Council Members, and other government officials, including foreign governments and especially Pacific Rim countries; response to include research, troubleshooting, collaboration, mediation, and drafting response

#### **LEGISLATIVE ACTS AND RESOLUTIONS**

- review and carry out responsibilities of Legislative Acts and resolutions, amend public copy of Chapter 514A, provide summary of condominium and related Acts and resolution for REC/staff/bulletin, etc.
- research, draft, and print any reports required by legislative Acts or resolutions or agreement
- amend public copy of Chapter 514A and 514B, and work with ASO for its publication; study the feasibility of ramseyer format of public copy of Chapter 514A and 514B

#### **INTERACTIVE PARTICIPATION WITH ORGANIZATIONS**

- continuous program
- active participation with Hawaii, National, International and Pacific Rim organizations and government agencies for the exchange of information and concerns, sharing of educational and research efforts, joint projects of mutual concern, training, etc. through attendance, membership and participation at local, regional, national and international meetings

- CAI, CAI Hawaii Chapter, HCAAO, HICCO, Condominium Council of Maui, IREM, ARELLO, Hawaii State Bar, Zenkauren (Japan), Condominium Management Center of Japan, NARCS, AARP, Senior living groups, etc.
- Commissioner and staff member participants shall actively participate in all communications, attend all pertinent meetings/workshops, and take an assertive role in representing the interests of the Commission, PVLD, DCCA, and the State, especially in all certification programs, participants to provide a written report to Commission/PVLD/DCCA of all participation

#### **NEIGHBOR ISLANDS OUTREACH**

- continuous program
- hold a minimum of three CRC meetings at neighbor island site with ERC and LRRC, counties of Kauai, Maui, and Hawaii are pre-selected sites and dates; plan for one and one-half day each
- consider to hold meetings in collaboration with the local boards, HAR, condominium organizations, etc.
- utilize the Office of Communications for press releases and newspaper advertisements

#### **CONDOMINIUM EDUCATION FUND (CEF)**

- continuous program
- maintenance and review of budget, finance, and records for the Condominium Education Fund (CEF); preparation of quarterly and annual financial statements; preparation of annual budgets; administration of fund investment through State Treasury
- plan and work with DCCA for funding of education and research programs, personnel compensation, and other expenditures subject to revenue projections and approved budget

#### **CONSUMER EDUCATION**

- new program
- develop a consumer education program targeting prospective purchasers of condominium units and new owners of condominium units, on initial project sales and resales

- consider a pamphlet or brochure on condominium living and governance in consultation with real estate professionals, condominium board members, condominium unit owners, and developers
- purchase existing brochures for distribution to initial purchasers or occupants of condominium units as to governance and the communal form of living
- utilize the Office of Communications for any publicity

#### **RULE MAKING, CHAPTER 53, FEES**

- continuous program
- monitor and review services provided in relation to fees, research/study, make recommendations, develop drafts, assist in the formal rulemaking process, including public hearing, with the Licensing Administrator
- administer with the Licensing Administrator any submissions through review process, hearing, approval, and implementation

#### **CPR PROJECT WORKSHOP AND MEETINGS**

- continuous program
- research and update CPR project workshop materials
- facilitate periodic workshops (at least two per FY) for consultants' training purposes, new laws and rules orientation, amendments to policies and procedures, amended forms or forms development for consultants, staff and commissioners to ensure consistency and accuracy; with purpose for the consultants, consider consultant alternating as workshop lead and developing curriculum at least 30 days in advance
- orientation/training for new consultants
- facilitate a workshop with developers, attorneys, condo consultants, CMAs, AOA focus groups for purposes of discussion on governance issues and how to address it early in the life of a CPR, from initial documents to the 1st AOA meeting
- joint program with the "Recodification of Chapter 514A"

#### **CONDOMINIUM SPECIALIST OFFICE FOR THE DAY**

- continuous program

- condominium specialists set up office at various neighbor island locations to meet and discuss condominium concerns with advanced publicity; upon request, provide for training to RICO Investigators
- utilized for AOA/CMA/CHO re-registration workshops
- consider a joint program with the Real Estate Specialist Office for the Day program
- consider and collaborate arrangements in conjunction with a function of a condominium organization and/or at a condominium organization office
- utilize the Office of Communications for publicity, press releases, and newspaper advertisements

#### **CONDOMINIUM SPEAKERSHIP PROGRAM**

- continuous program
- subject to resources and approvals, honor requests from condominium organizations, interested groups, colleges or universities, Legislators, government agencies, etc. for participation in some type of program as a speaker or resource concerning condominium issues; participant includes Condominium Specialist, Supervising Executive Officer, Executive Officer, or Commissioner
- joint program with the "Recodification of Chapter 514A"

#### **TECHNOLOGY AND WEBSITE**

- continuous program
- administration of in-house and network system, coordination with DCCA's coordinator, training of staff, purchases of hardware and software, programming, etc.
- utilize laptop computer with screen projection at meetings, symposiums, training, speakership, etc.
- utilize scanning for website, storage of public information, and other programs; develop CD ROM PC for review and use of educational materials and courses by the public
- continue the electronic storage, review, and printing of condominium projects, public reports, association registration, etc., public information

- administer the webpage with a long range plan of including all condominium information, forms, database, etc., and online registrations
- work with DCCA and PVL on plans on technology, computer systems, network, etc. including joint venturing on projects and purchases
- feasibility of purchasing a wireless PC-based telephone conferencing equipment to facilitate participation in neighbor island condominium community and developers
- study the feasibility of web conferencing and equipment
- study the feasibility of providing AOAOS a central depository for all governing documents, minutes, etc. via voluntary participation, including the cost of such a program

#### **CASE LAW REVIEW PROGRAM**

- continuous program
- monitor, collect, and report on judgments and decisions on Hawaii court cases, federal court cases, and other states court cases; material cases to be considered for Condo Bulletin; report on governance case studies

#### **START-UP KIT FOR NEW AOAOS AND NEW CMAS**

- continuous program
- distribute start-up kit to new condominium AOAOS and new CMAS; which includes a copy of §514A/514B, rules, budget and reserves guide, board of director guide or brochures, past condominium bulletins, etc., with 3 ring binder
- including the reprinting of any necessary product

#### **RECORDS MANAGEMENT**

- continuous program
- administer and organize all records (paper and computer files), reference materials, reports, minutes, legislation, rules, AG opinions, contracts, etc.; consider distribution of expired records
- consider EH or consultant, or special training for staff
- administration of Records Report System and Uniform Information Practices Act with consultation with the

Office of Information Practices; user friendly access to public information

- research options/alternatives for records storage (computer, scanning, optic readers, microfilm, etc.) and public information provided via local E-mail systems or e-government site, including capability of making own copies
- scan and provide electronic storage of records, including minutes

#### **COOPERATIVE EDUCATION, RESEARCH, AND ADMINISTRATIVE PROGRAM**

- continuous program
- actively participating and sponsoring cooperative education research, and administrative programs for those Departments, Divisions, Branches that provide direct or indirect services

#### **DIVISION AND DEPARTMENT PROGRAM**

- continuous program
- coordinate activities and programs of mutual concern with PVL, RICO, and DCCA; Director's project on deregulation
- review, analyze, and coordinate positions on Chapter 436B as it relates to Chapters 514A and 514B with PVL and AG's Office, especially self-executing provisions
- coordinate and work with RICO on joint program on governance/management complaints and mediation, unified position/voice; see Condominium Mediation and Arbitration Program
- provide REC sponsored condominium education to RICO, Time-Share Administrator, Subdivision EO, OAH, through complimentary registrations or CEF paid registrations

#### **STAFF AND COMMISSIONERS DEVELOPMENT**

- continuous program
- development and training of REB staff and Commissioners for better administration of the condominium programs and issues
- assist in amendments to REC Reference Book by researching and drafting amendments relative to CRC and its programs

- participate in training of staff and commissioners as provided by CAI, ARELLO, REEA, CLEAR, and other organizations

#### CONDOMINIUM REFERENCE LIBRARY

- continuous program
- develop and continue to provide materials for a condominium reference library at public libraries (State Library System and Makiki Library), REC office, mediation services offices and possibly institutions of higher learning, especially on the neighbor islands, stocked with purchased referenced materials, REC and HREREC materials; purchase and donate to specified public libraries condominium reference material, with REC name and CEF, and REC to initiate list of reference material and where located for associations; study and report on the feasibility of increasing and adding new educational materials at libraries, especially in high CPR concentrated areas, collaborate with CAI-Hawaii, and consider an internet reference library system including links with REC webpage and possible licensing arrangements with national providers such as CAI
- continuous publicity program upon development of the reference library
- study and report on the usage of the condominium reference library materials at the State Library System and REB office
- develop and continue to maintain on the REC webpage a catalog of all public reference materials provided to the State Libraries and at the REB office
- update all condominium library reference materials, including board of directors chapters and its printing, and law amendments; joint program with the "Recodification of Chapter 514A"